Everydayhero Training Manual
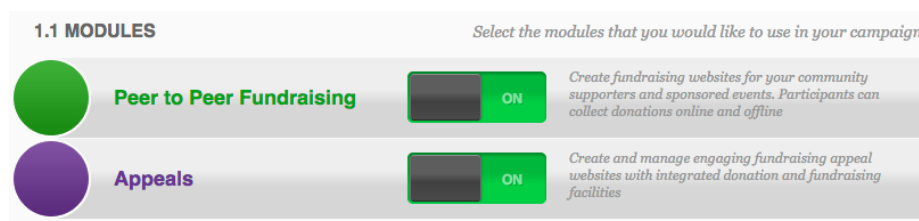
Building a Campaign in 5 Steps

Building a campaign through **everydayhero** is easy. Just follow these simple steps. Before you begin, make sure you have your banners and other images ready. Please see Appendix 1 for design specifications.

Step 1

Click on Create Campaign and then select the modules you would like to use for this event.

Peer to Peer Fundraising – *Allows supporters to create their own fundraising page*

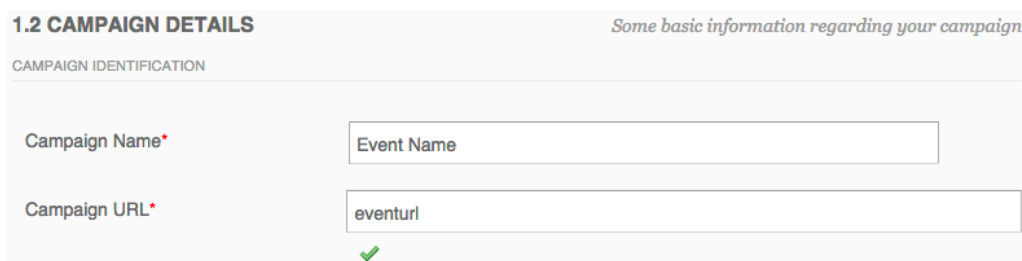**Appeals** – *Allows donors to make a donation directly to the campaign*

Then, enter your campaign (event) name and your campaign (event) URL.

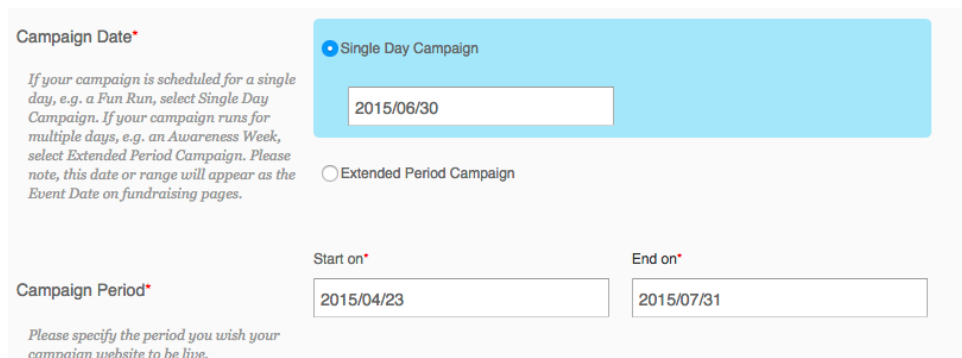**everydayhero URL Structure** – www.everydayhero.com.au/event/**eventurl**

Please note: Underscores cannot be used in campaign URLs – but you can use hyphens to separate words if necessary.

Select your campaign (event) date.

Single Day Campaign – *Use this option for events that are on one day*

Extended Period Campaign – Use this option for events that are over more than one day

If your event is happening in a

specific location, you can enter the address too. Address is optional

Campaign Address

Add a campaign location to improve your search results. You can add a specific address or simply a region (e.g. City, Country).

Next you can turn Donor Uplift on or off for this particular campaign (event).

Enable Donor Uplift
Allow donors to add a donation uplift.

Donor Uplift Rate (%)   5.0

Select the percentage to be added as a donation uplift.

Donor Uplift encourages your donors to give a little bit extra, based on the percentage you set in Heroix.

![everydayhero]

Step 2

Select your layout for your microsite content from a variety of pre-designed templates. You can also select your colour scheme or create a custom colour scheme to match your brand colours.

To create a custom colour scheme just check the "Custom Colour Scheme" box.

Primary Colour - *The primary colour will be the background colour of both your campaign and your supporter pages. If you load background images in, the primary colour will not be seen.*

Secondary Colour - *The secondary colour will appear on your navigation bar at both the top and bottom of the campaign. As the navigation bar text is white, we recommend using a dark colour for this.*

Tertiary Colour - *The tertiary colour will be used as the colour for the funds raised tally and the top supporters leaderboard.*

You can also load a background image at this point if you are using one.

Then upload your campaign (event) image to continue with the setup.

If available, upload your other campaign design assets, but you can also come back to those later if needed.

When you are ready, click continue.

It may take a couple of minutes for the next screen to load, depending on the size of your images.

Campaign Image*

No file selected   Browse

This image or logo is mandatory for the campaign to be displayed on the event on everydayhero.com.au.

Campaign Banner

No file selected   Browse

Appears at the top of your microsite. Dimensions 815px x 226px.

Baseplate Image

No file selected   Browse

Appears at bottom of your microsite and all fundraising pages. Dimensions 815px x 100px

Supporter Banner

No file selected   Browse

Appears at the top of supporter Pages. Dimensions 940px x 290px.

Supporter Background Image

No file selected   Browse

Appears in the background of all your supporter pages. The image is centered and fixed to the top of the page. Maximum file size of 300kb.

Step 3

Go to Edit Micro-Site to adjust the look and feel of your campaign. There are a number of tabs in this section that you can use to enhance your microsite.

Site Design – *This is where you can adjust the look and feel of the front page of your microsite, add event information into the Primary and Secondary content areas, and adjust the layout and colour scheme.*

The Primary and Secondary content areas allow you to put in the information you want people to know about your event – what its all about, when it is, and important information they may need to know about participating.

If you have a video on Youtube that you would like displayed on your campaign, paste the URL into the box displayed below the Secondary Content area

Font

Primary content

> Thank you for supporting us, your fundraising efforts will make a real difference. To make fundraising for us even easier, we've partnered with Everyday Hero to give you the ability to create your own online fundraising page. In just minutes you can build and customise your page, then start sharing the link with your friends, family and colleagues and asking them to make a donation. Every donation is then recorded on your fundraising page along with a message of support from your donors. So what are you waiting for? Create your own online fundraising page today!

Path: p

Secondary content

Path: p

YouTube URL

Insert youtube url to appear on microsite homepage.

You can also choose whether your charity profile information, social media links and facebook feed appear on your campaign. Just use the sliders to turn these on or off. The charity information and social media links pull through from your account.

Show Charity Profile
Show your charity profile at the bottom of microsite homepage.

Show Social Media Links
Show your social media links in your microsite sidebar.

Show Facebook Widget
Show your Facebook widget in your microsite sidebar.

This is also where you can adjust the colour scheme, layout and background for the campaign if you need to.

Select Template

Select a layout for your microsite content.

Select Colour Scheme*

| Primary Colour	9ec2a9
Secondary Colour	697
Tertiary Color	697

Background Image

No file selected	Browse

Background images are centred and top-aligned. Recommended width is 1600 pixels. Minimum recommended height is 1200 pixels but will depend on your microsite content. Microsite content is 815 pixels wide.
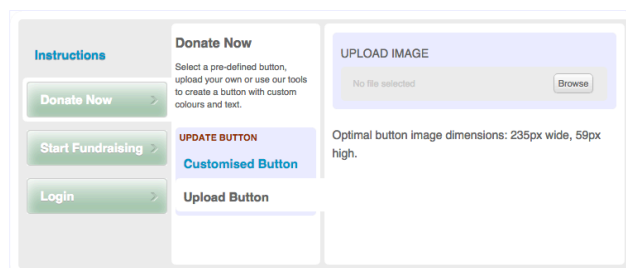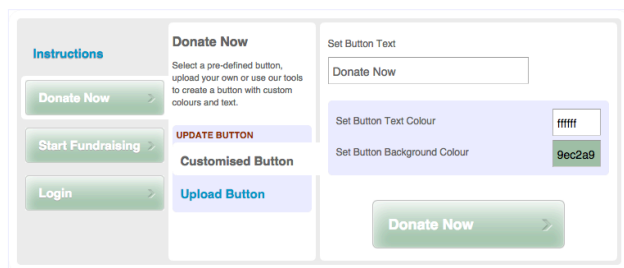
☑ Custom Colour Scheme

Custom Content

Donation Tally

Leaderboard

▶ Custom Content *optional*

Links *optional*
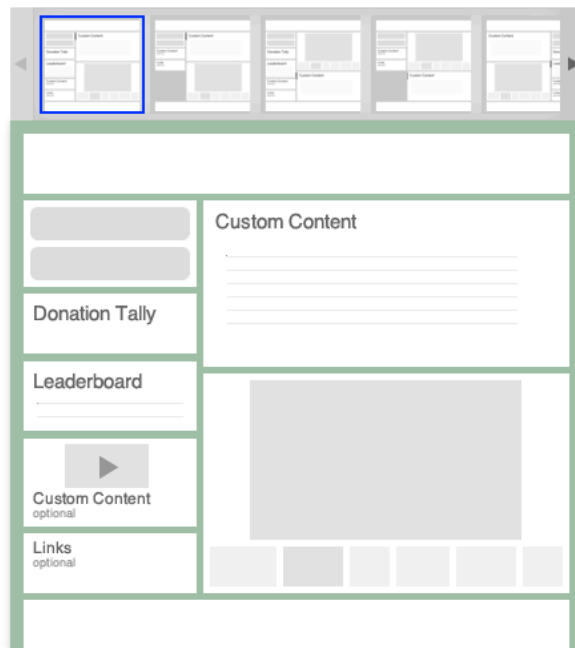
Buttons – *Adjust the colour of your buttons or choose to load custom buttons*

You have two options when customising your buttons:

1. You can adjust the colour of the exisiting buttons
2. You can upload custom button images which can be created by your design team

Instructions

Donate Now
Start Fundraising
Login

Donate Now

Select a pre-defined button, upload your own or use our tools to create a button with custom colours and text.

UPDATE BUTTON

Customised Button

Upload Button

Set Button Text

Donate Now

Set Button Text Colour — ffffff

Set Button Background Colour — 9ec2a9

Donate Now

Instructions

Donate Now
Start Fundraising
Login

Donate Now

Select a pre-defined button, upload your own or use our tools to create a button with custom colours and text.

UPDATE BUTTON

Customised Button

Upload Button

UPLOAD IMAGE

No file selected	Browse

Optimal button image dimensions: 235px wide, 59px high.

Links and Pages – *Arrange the tabs on the navigation bar and add additional tabs. You can add a link to another site, such as your charity website and even add additional pages of content*

Header		
	+ Add Custom Link	+ Add new page
TITLE	URL	ACTION
⇅ Home	/event/testcampaign-2015	🔧 🗑
⇅ Sponsor a Friend	/event/testcampaign-2015/sponsor_a_frie	🔧 🗑
⇅ Contact	/event/testcampaign-2015/contact	🔧 🗑
⇅ Top Supporters	/event/testcampaign-2015/top_ten	🔧 🗑
⇅ Ten Tips	/event/testcampaign-2015/tentips	🔧 🗑

To add a new link to the navigation bar, choose the add custom link button.

+ Add Custom Link
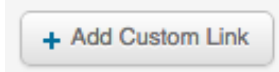
Enter the name of the tab and the URL you would like it to direct to.

⇅	Website	websiteurlhere	🔧 🗑

To add a new page of content, click the add new page button.

Then follow the 3 step process:

1. Choose your layout
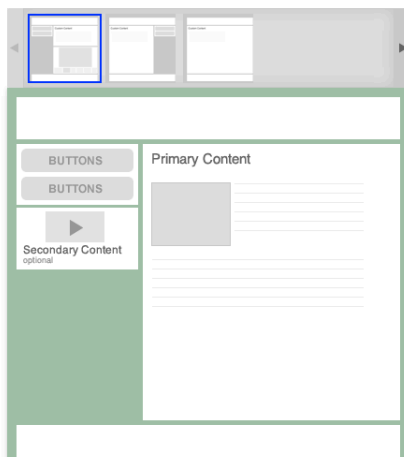
2. Enter your content
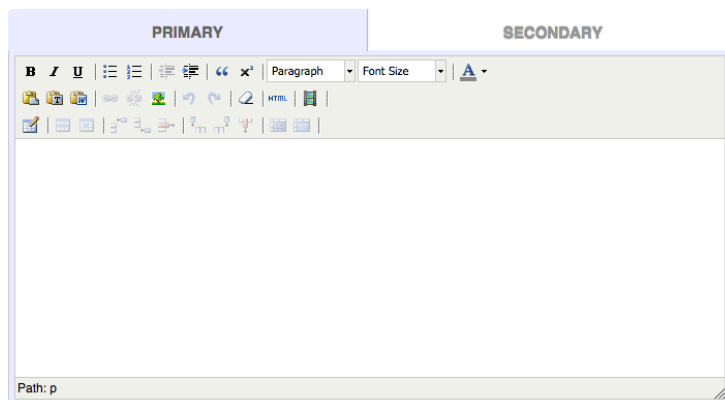
3. Give your page a title and URL

Images – *In this section you can load new banners, sponsor logos and images for the microsite slide show*

If you need to change your banners at all after you have created your campaign, just go to the images tab.

Campaign Image*

This image or logo is mandatory for the campaign to be displayed on the event on everydayhero.com.au.

Replace existing image?

Campaign Banner

No file selected   Browse

Appears at the top of your microsite. Dimensions 815px x 226px.

Supporter Banner

No file selected   Browse

Appears at the top of supporter Pages. Dimensions 940px x 290px.

Supporter Background Image

No file selected   Browse

*Appears in the background of all your supporter pages. The image is centered and fixed to the top of the page. Maximum file size of 300kb.*

Baseplate Image

No file selected   Browse

Appears at bottom of your microsite and all fundraising pages. Dimensions 815px x 100px

If your event has sponsors just load their logos into the Sponsor logo sections. Enter their website into the URL box to hyperlink the logo.

Sponsor Logos

Appears on bottom of your microsite.

New Sponsor

Re-Order   Edit

Logo

No file selected   Browse

Title

Delete

URL

You can also add a slideshow of up to 5 images to your campaign. Just add them in the bottom section of the images tab.

Microsite Homepage Images

Add up to 5

No file selected   Browse

Add another...

Downloads – *Add downloadable content, such as posters or maps as well as images to insert into areas, such as the primary content, of your microsite.*

If you are adding content for people to download, click "add new asset" then choose your file. Give it a name (this will appear on your microsite) and tick the list box (this will ensure it is available for your supporters to download). Then simply update the campaign.

Hosted Images Save and store images you may use on microsite pages here.		+ Add new asset
TITLE	FILE	LIST ACTION
⇅ Example Poster	**Example-Poster.docx (26.6 KB)** https://www.everydayhero.com.au/events/downloads/0002/0086/Example-Poster.docx	☑ 🗑

If you have an image you would like to insert, click "add new asset" then choose your file. Name it so you know which image it is and ensure that the "list" box is unticked. The update the campaign.

Once you have updated the campaign, return to the downloads tab, where you will see your image now has a URL. Copy this URL.

⇅ Image	**Image.png (296.1 KB)** https://www.everydayhero.com.au/events/downloads/0003/7576/Image.png	☐ 🗑

Then go to the area you would like to insert the image and select the tree icon.

| **B** *I* <u>U</u> | ☰ ☰ | ⇥ ⇤ | 66 x² | Paragraph ▾ | 14px ▾ | **A** ▾ |
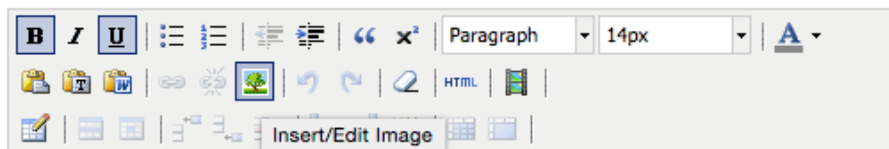
Insert/Edit Image

Paste your URL into the pop up box, adjust the size if you need to, then click 'insert' and update the campaign

Insert/Edit Image

Image URL	
Image Description	
Alignment	-- Not Set -- ▾
Dimensions	☐ x ☐
Border	☐
Vertical Space	☐
Horizontal Space	☐

Insert   **Cancel**

Step 4

Go to the Edit Peer to Peer Features section to customise the supporter's experience.

EDIT PEER TO PEER FEATURES ›

General – *Customise the default page goal amount and the default donation dollar handles. You can also choose to allow supporters to specify their own event date when setting up a page (great for community fundraising events). In this section you can switch on the offline donations function, which allows supporters to add offline donations to their fundraising tally.*

DATE OPTIONS

Permit supporter to select an event date within a defined period ✗

Enter the defined period and default date

Start	End	Default
2015/05/21	2016/07/31	2015/06/10

DONATION OPTIONS

Allow supporters to enter offline donations received

Disabled

✗ Show Everyday Hero service fee to potential donors

PRE-SET DONATION AMOUNTS

You can nominate the pre-defined donation amounts presented to potential donors. Note: All donors will have the ability to enter any amount in the "other amount" box.

| $200 | $100 | $50 |

DEFAULT GOAL AMOUNT

Set the default goal that you would like to appear on supporter pages.

Default page goal amount $

Teams – *Choose how supporters can fundraise – as individuals and/or as part of teams. You can also set a team size limit if you need to. We recommend also taking the time to tick the box at the top, to allow supporters who are part of teams to appear in the top fundraisers leaderboard.*

TEAMS

TEAM OPTIONS

Allow team members in individual top ten fundraising leaders table ✓

Allow supporters to fundraise
- ☑ As Individuals
- ☑ By Joining Teams
- ☑ By Creating Teams

Team Size Limit   0

Limit the size of teams to a certain number. A value of zero indicates no limit.

Customise – *This section allows you to enter a custom default page story for your event for both teams and individuals. You can event adjust the heading if you like.*

CUSTOM COPY

	Reset to default text
Individual Story Heading *Story heading for individuals*	My Story

	Reset to default text
Team Story Heading *Story heading for teams*	Our Story

Default Individual Story
Default story for individuals

Reset to default text

I've created this page because I want to make a difference. I'm inspired by the work that %{charity_name} do, so I wanted to raise money for them as part of my participation in %{campaign_name}. Please help me help them by giving whatever you can using the 'Give Now' button. The more people that know about %{charity_name}, the greater their impact, so please also spread the

Default Team Story
Default story for teams

Reset to default text

We've created this team because we want to raise money and make a difference by participating in %{campaign_name}. Please help us by giving whatever you can using the 'Give Now' button. The more people that know about %{campaign_name}, the greater the impact, so please also spread the word by sharing our page with your friends and family. Thank you in advance

Emails – *Customise the email which is sent out to supporters when they create their page*

NOTIFICATIONS

Supporter page notifications

Receive an e-mail notification when a new fundraising page is created to an e-mail address other than the nominated fundraising contact for the charity.

If you would like to receive new supporter notifications directly to your inbox for the campaign you are setting up, just enter your email address in this section.

EMAILS

You can edit your *Campaign Email Signature* from the Campaign Details section.

New page email content

*When a fundraiser creates a Fundraising page, this email is sent.*   Reset to default email

Hi there <PAGE OWNER NAME>,

Thank you for creating a supporter page as part of <CAMPAIGN NAME>.

Here's the direct link to your page which is live from now until <PAGE EXPIRY>:

<PAGE URL>

You can update your page or personal details at any time by signing in to your account using this email address: <PAGE OWNER EMAIL> and the password you created.

Here are a few ways that you can start using your supporter page to make a difference:

Spread the word

Post updates, images and videos of your what you're doing and share these with your friends on Facebook and Twitter to help get the word out.

HANDY HINT: When customising the email content, include any phrases that appear between these symbols: <>. This ensures that your supporters receive important information, such as their page URL and the expiry date of their page.

everydayhero

Step 5

If this is an Appeal, such as a Tax Appeal, go to the Edit Appeals section to customise the donation screen.

EDIT APPEALS ❯
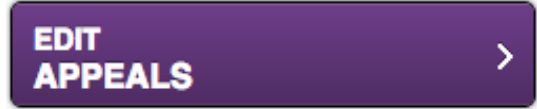
Survey Questions – *Add additional questions, such as "How did you hear about this Appeal". You can add as many additional questions as you like.*

You can choose from 4 different input types: Free Text, Select (drop down list), Radio Buttons and Checkboxes (for questions that allow more than one response).

Preset Donation Amounts – *Customise the preset donation amounts. You can also decorate the dollar handles with text and images*

You can choose to have plain dollar handles and simply customise the amounts.

Or you can have decorated handles, that include a description and image to accompany each of your donation amounts.

Other things to consider

If you need to adjust the campaign date, review the Donor Uplift amount or activate regular giving for your campaign, go to Edit Campaign Details

EDIT CAMPAIGN DETAILS ›

If you need to add finance codes to assist with reconciliation and disbursement of donations, go to Edit Campaign Codes. You can add up to three finance codes per campaign.
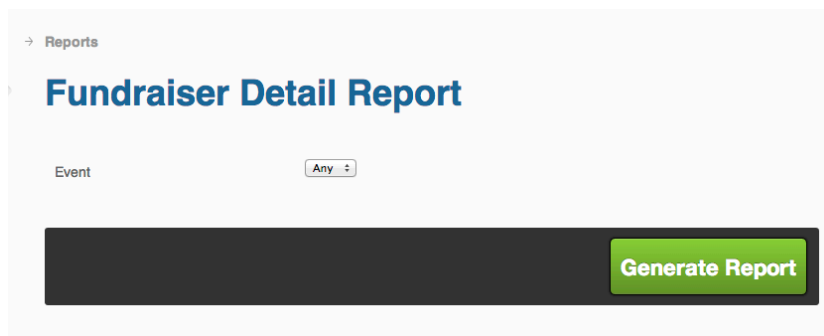
EDIT CAMPAIGN CODES ›

HANDY HINT: You can use the Preview Microsite function throughout the process to see how your campaign is looking. Once you are happy with the look and feel, you can go live by clicking the button in the top right hand corner.

Accessing Data from everydayhero

Supporter Information

For supporter information select either the **Fundraiser Detail** or **Hero Page Detail** report from the predefined reports box.

A Fundraiser Detail report will provide you with an overview of any given event. Just select the event from the drop down box.

A Hero Page Detail report can be run by date range as well as event. You can also run a hero page report that includes a list of donors who donated to each page, just tick the box for detailed donations. This can be useful if you want to save time and run one report instead of two.
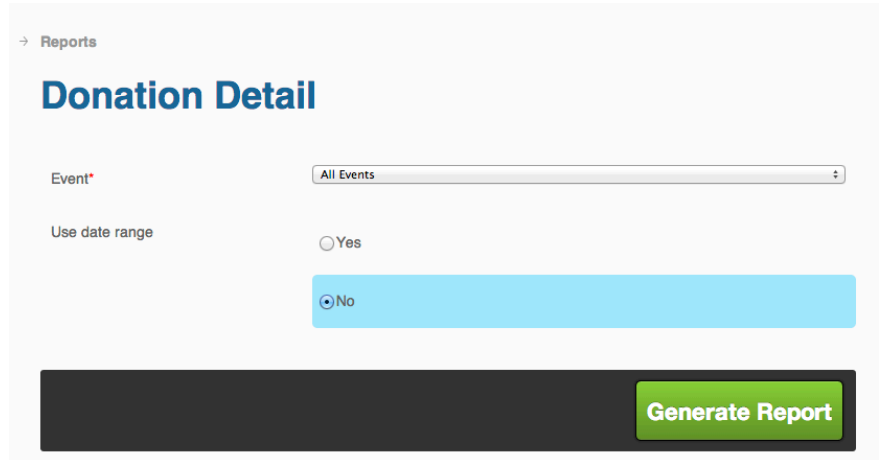
HANDY HINT:

- If you want to visit your supporters' pages and see what they are doing, run a Hero Page Detail report. This will give you the full page URL.

- For team information, use the Fundraiser Detail Report

Donor Information

For donation information, select either the **Donation Detail** or the **Donor Uplift** report from your predefined reports box, depending on the information you need.

To find out how much was donated through a particular event or in a particular date range, choose the Donation Detail report.
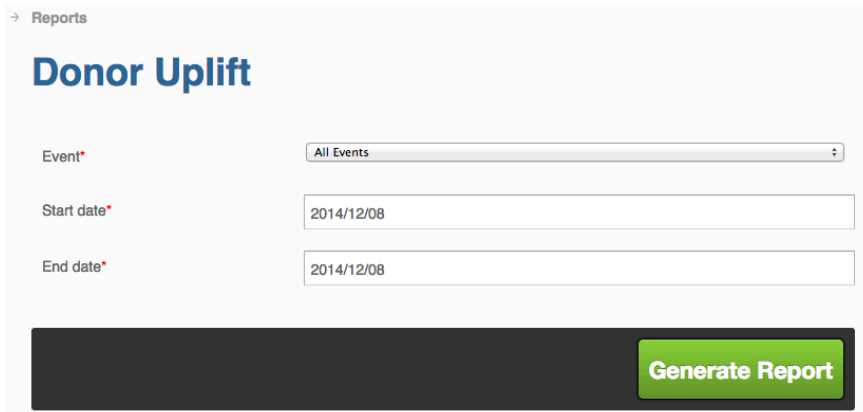
If you want to know more about the donation, such as whether it included donor uplift, or if you need a breakdown of the fees, choose the Donor Uplift report.

Please note, you will need to set a date range when running this report.

HANDY HINT:

- If you need to access information on finance codes associated with donations, you will need to run a Custom Donation report

Financial Statements

Financial Statements can be located in the Reports section also. To access Remittance Advice and Transaction Detail reports, select the financial statements option from the Predefined Reports box.

There will be a **Remittance Advice** and **Transaction Detail** report for each fortnightly remittance period.

The Remittance Advice will provide top line information, such as the gross and net amount of the payment for that period.

The Transaction Detail report will break down the remittance by donation, to show how many donations were included in that remittance and which events those donations came from.

Financial Statements

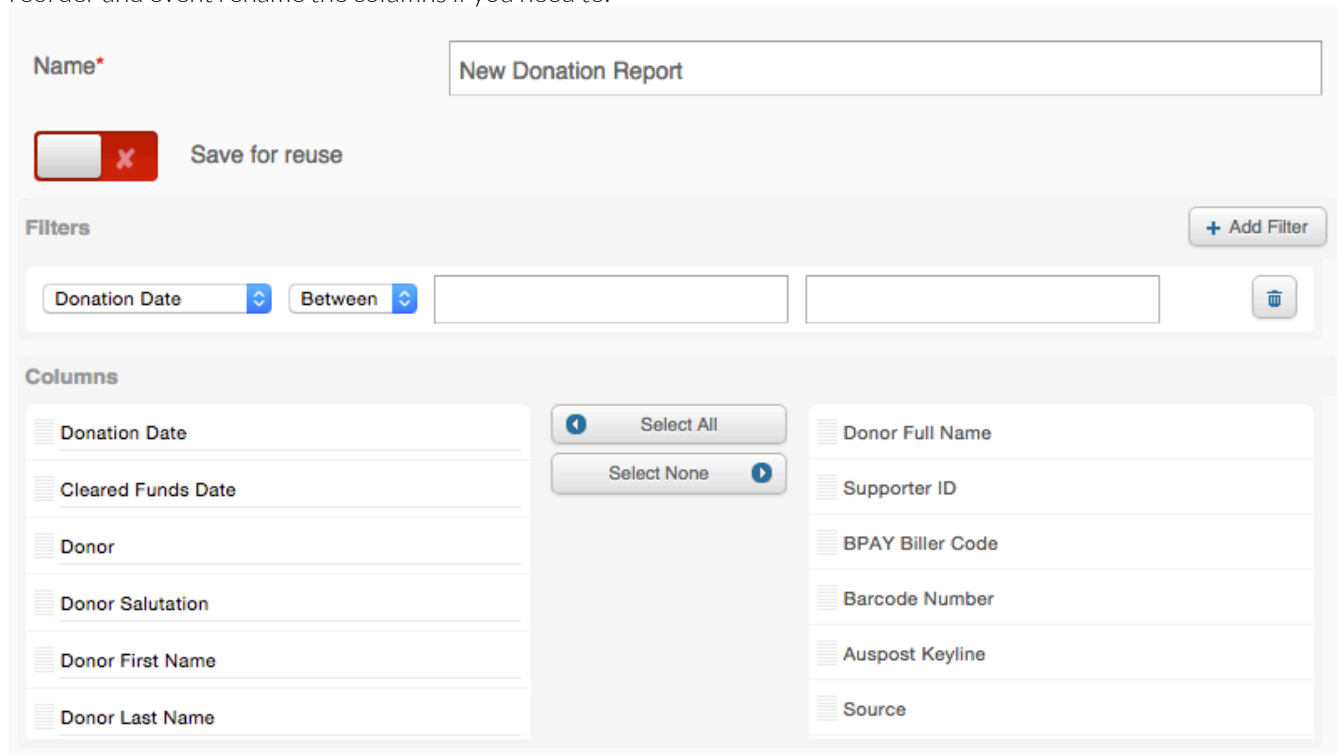| Payment Period	Payment Type	Remittance Advice	Transaction Detail
11/03/2014 to 25/03/2014	Donations	download	download
19/11/2013 to 03/12/2013	Donations	download	download
30/07/2013 to 13/08/2013	Donations	download	download
04/12/2012 to 18/12/2012	Donations	download	download
			Show All

Custom Reports

Custom Reports are designed to help you run a report to answer a specific question, reduce the amount of filtering you need to do after running a report or provide you with a report that is ready to import into another database.

There are two kinds of Custom Reports which you will run: **Fundraising Page** and **Donation.**
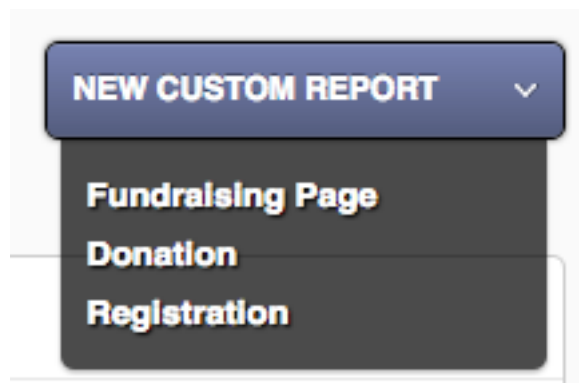
To access custom reporting log into your charity account and visit the reports section. From here, select the new custom report button and choose the type of report you would like to run.

Then you can build out your report. You can choose from a range of filters, add or remove columns for the report, reorder and event rename the columns if you need to.

We recommend watching our Custom Reporting Tutorial to familiarise yourself with custom reporting.

Multi-Charity Events

Creating your team

Creating a team in a Multi-Charity Event is easy and can be done in a few simple steps.

1. Visit your **everydayhero** charity profile page to choose the event: INSERT PROFILE URL

2. Once you have found your Charity Profile, click on the event icon to visit the fundraising site, then click on the Start Fundraising button.

3. You will need to enter a few details to get your fundraising account started - enter an email address (yours or a generic organisation one such as info@charity.org), a name (yours or the charity name), a contact number and a password so you can log back in. Alternatively, if you already have an account from a previous event, just use the Log In button on the Sign Up screen.

4. Next, you will just need to enter a few more details to complete your team leader page - select the charity and a page name (do not enter the team name at this point). If this is a new account, you will also need to enter a date of birth and a postal address. Once all this information is entered, click on "Create Page"

5. You will be directed to your team leader page, where you can then set up the team page. Just click on the "create a new team link" to the right hand side of your team leader page and enter your team name.

6. Congratulations, you have created your Charity Team Page. Now, just take the time to personalise it by clicking on the edit this team page button.

HANDY HINTS:

- The account sign up process is how **everydayhero** gathers the information about your supporters that we pass back to your charity.
- Remember, for Multi Charity Events, creating a team FUNDRAISING page, will not create a RUNNING team for the event. Contact the event organisers for more information on Running Teams.
- Don't forget to remind your supporters to register for the event! Creating a supporter page will not register them for the event.

Managing your team

Here are some tips to help you manage your team page:

- Set a goal for your charity team page and don't be afraid to aim high!
- Add some information about your charity to the Team Story section. Let people know why you are aiming to raise a certain amount and tell them about the great work your charity will be able to continue with that amount.
- Add a profile picture - this can be anything you like. If you are looking at getting a logo or image designed specifically to use on your team page, the dimensions for the image are 230x230px
- Share you link far and wide - add it to your newsletters, social media sites and your website. Contact past supporters and donors and encourage them to join or donate.

If you are the team leader - you can invite other people to join your team using "invite members" button, or people can join your team from their own Supporter pages, using the "join an existing team" link on their page.

Once supporters have requested to join your team, you will need to approve them. You will receive an email notification each time someone requests to join your team. Just log into your team page to approve the requests.

Appendix 1

Mandatory Assets

Mandatory assets are the minimum assets that need to be added to a campaign in order to activate the campaign.

- Campaign Banner - 815px x 226px
- Campaign Image - 150px wide or high

Optional Assets

Optional assets can be added in to improve the look and feel of a campaign.

- Custom Buttons - 235px x 59px
- Campaign Background Image - 2000px x 2000px
- Footer - 815px x 100px

Supporter Page Design

- Supporter Page Banner - 940px x 290px
- Supporter Page Background Image - 2000px x 2000px